

DRS ADVISORY COMMITTEE MEETING

**Marcie Frost, Director
November 1, 2013**

CUSTOMER SATISFACTION

THE THREE R'S

- **Respectful:** You can expect
 - To be treated as a valued customer by a patient and caring person, who is happy to help you.
 - To be carefully guided through the retirement process.
 - To be informed of the issues that impact your retirement in a way that is easy to understand

CUSTOMER SATISFACTION

THE THREE R'S

- **Responsive:** You can expect
 - To have quick access to people who can help you.
 - To receive timely responses to your requests.
 - To be kept informed of the status of your requests.
 - To speak with people who anticipate your needs and offer solutions.
 - To be provided with easy-to-use forms and tools that can be found online.

CUSTOMER SATISFACTION

THE THREE R'S

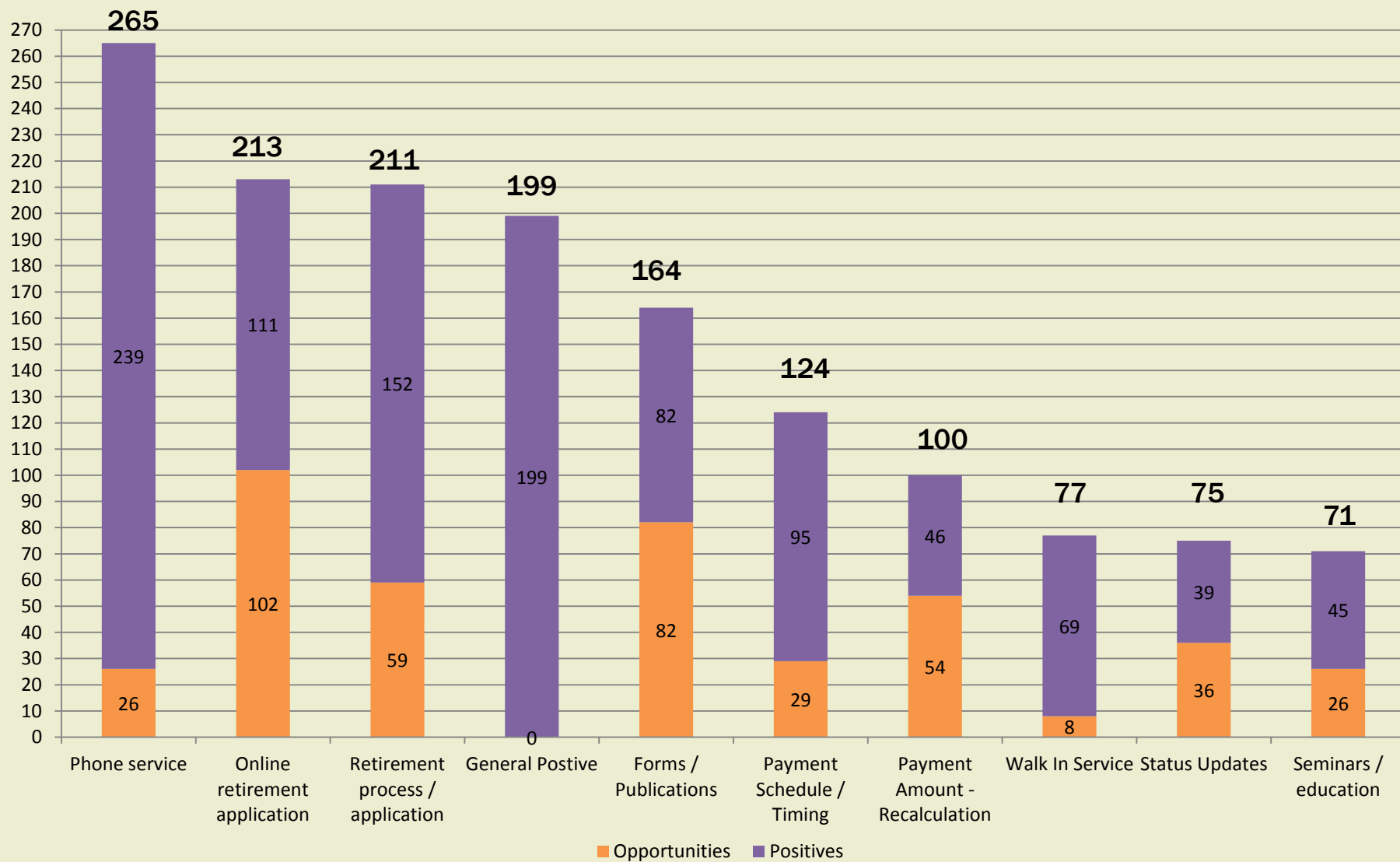
- **Right:** You can expect
 - The information you are given to be right.
 - To receive information from a knowledgeable, professional person

Customer Satisfaction

- Monthly interviews conducted by agency leaders
- 622 interviews since March 2013
- Themes:
 - Benefit recalculation takes too long
 - Letters, forms and publications hard to understand
 - More frequent status updates during the application process
 - Online retirement application easy to use but suggestions for making it better
 - Pleasant, knowledgeable analysts
 - Appreciation for phone and walk in service

TOP TEN TOPICS - OVERALL

BASED ON THE NUMBER OF TIMES CUSTOMERS MENTIONED EACH TOPIC BOTH POSITIVELY AND AS AN OPPORTUNITY



March-September 2013 Interviews

Actions

- **Keep me informed** – Adding status updates to the online retirement account application.
- **Delays in receiving estimates** – Prioritize requests to consider retirement date, not only the date received.
- **Benefit recalculation takes too long** – Team identified new process to identify accounts that have complete information; reduces recalculations needed.
- **Walk-in Consultations** – Creating a check list to clarify additional actions customers need to take after their consultation.
- **Letters not easy to understand, customers miss key information** – Breakthrough planning session scheduled on November 22.

Team Engagement

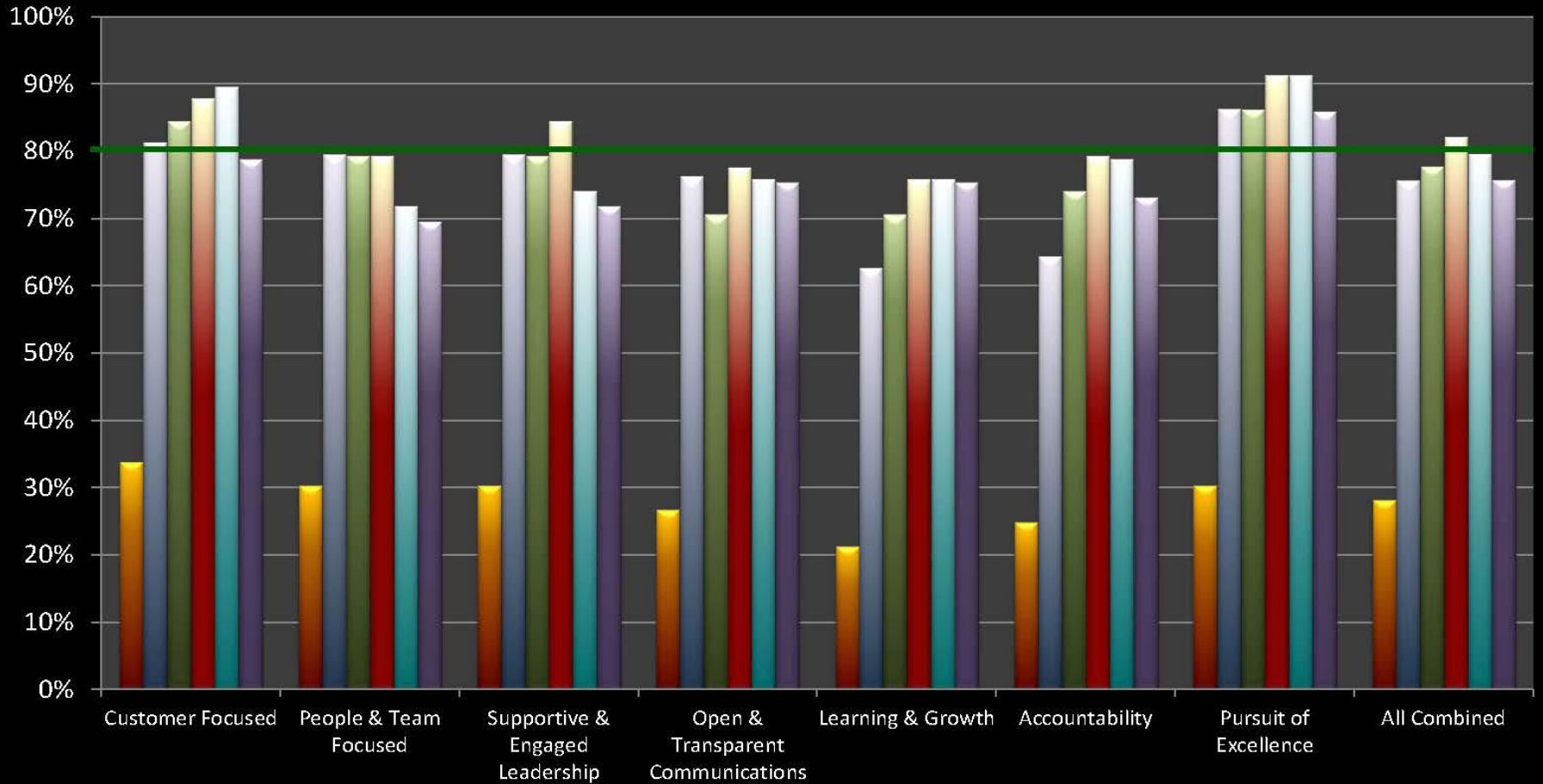
- Team member satisfaction and the value of an engaged workforce
 - Quarterly interviews with seven criteria
 - Interview comments posted on the Intranet
 - Interview feedback used for Leadership development
 - Utilizing IdeaScale for team member suggestions
 - A strong hiring/recruitment process

Team Member Satisfaction

Percent of Employees Interviewed Rating 8 or Higher

— Target: 80% of employees will rate at an 8 or higher

■ Baseline: May 2011
 ■ Cumulative: Aug 2011-May 2012
 ■ Cumulative: Nov 2011-Aug 2012
■ Cumulative: Feb 2012-Nov 2012
 ■ Cumulative: May 2012-Feb 2013
 ■ Cumulative: Aug 2012-May 2013



DRS MANAGEMENT SYSTEM



Department of Retirement Systems Fundamentals Map

FOUNDATIONS

KEY GOALS

OUTCOME
MEASURES

MEASURE OWNER

MISSION
We provide information, tools, expertise and services that ensure our members receive the retirement benefits they earn while in public service

VISION
Satisfied customers
Valued team members

VALUES
Customer Focus
Team Member Engagement
Valued Relationships
Performance Excellence
Resource Stewardship

Engaged
Team
Members

Vigilant
Resource
Steward

Best
Practice
Leader

Reliable
Partner

Elated
Customers

Customer
Satisfaction
O1

Jennifer Dahl

Team
Satisfaction
O2

Lee Strehlow

Employer
Satisfaction
O3

Mike Ricchio

Stakeholder
Satisfaction
O4

Dave Nelsen

Operational
Health
O5

Marcie Frost

Retirement
Readiness
O6

David Brine

Benefits
Paid
O7

Mike Ricchio

Ideas
Implemented
O8

Shawn Merchant

Charitable
Participation
O9

Dave Nelsen

Performance to
Budget
O10

Mark Feldhausen

Cost
Effectiveness
O11

Mark Feldhausen

OPERATING PROCESSES

SUPPORTING PROCESSES

CORE
PROCESSES

PROCESS OWNER

SUB
PROCESSES

PROCESS
MEASURES

Developing &
Implementing
Policies
OP1

Dave Nelsen

1. Monitoring policy environment
2. Analyzing external policy ideas
3. Informing policy makers
4. Determining policy and/or rule needs
5. Developing policy and/or rule
6. Implementing policy and/or rule

- a. Participate at policy meetings
- b. Rule development
- c. Timely fiscal notes

Maintaining
Member &
Employer Info
OP2

Chris Lamb

1. Enrolling & maintaining employer information
2. Educating employers
3. Collecting & updating member information
4. Managing documents
5. Auditing employer processes
6. Auditing member information
7. Sharing information

- a. Self service transaction time savings
- b. Employer corrections
- c. hoki for replacement measure
- d. Late employer reporting

Accounting for Retirement
Funds
OP3

Mike Ricchio

1. Receiving & depositing contributions
2. Directing funds
3. Creating & managing receivables
4. Reconciling general ledgers
5. Accounting for benefit deductions
6. Creating financial reports
7. Accounting for benefit payments

- a. Member receivables
- b. Credit redistributions
- c. Employer receivables
- d. Employer paper checks
- e. Reconciliations

Promoting Retirement
Readiness
OP4

David Brine

1. Partnering with employers
2. Educating new members
3. Promoting online account
4. Promoting retirement planning tools
5. Marketing DCP
6. Providing 1-1 assistance
7. Providing presentations & resources
8. Targeting reminders to waypoints
9. Working with education partners

Capability Breakthrough (Under Development)

Paying Benefits
OP5

Jennifer Dahl

1. Receiving payment request
2. Verifying eligibility
3. Processing payment request
4. Calculating payment
5. Issuing payment

- a. Online retirement applications
- b. Benefit calculation accuracy
- c. Estimate accuracy
- d. Estimate turnaround
- f. Recalc turnaround

Managing Organizational
Performance
SP1

Marcie Frost

1. Defining strategy
2. Setting operational targets
3. Selecting strategic initiatives & targets
4. Connecting employees to targets
5. Creating organizational understanding
6. Managing operations
7. Managing strategic initiatives
8. Reviewing organizational performance
9. Making performance corrections

- a. Process measure health
- c. Strategy execution

Supporting Team
Members
SP2

Lee Strehlow

1. Recruiting & hiring
2. Orienting & onboarding
3. Learning & growth
4. Observing, coaching, evaluating performance & behavior
5. Creating development plans
6. Recognizing accomplishments
7. Maintaining employee information
8. Equipping employees
9. Managing facilities
10. Fostering safety & wellness

- a. Training hours
- b. Safety & Wellness
- c. Turnover
- d. Present to win
- e. Time to fill positions
- f. Employees trained

Providing Information
Technology
SP3

Chris Lamb

1. Governing enterprise architecture
2. Controlling production release
3. Ensuring security
4. Providing business systems analysis
5. Conducting operations
6. Developing solutions

- a. Request backlog
- b. Systems intervention
- c. Estimated completion
- d. Hours to resolution

Leading Innovation
SP4

Shawn Merchant

1. Assessing business needs
2. Researching & monitoring
3. Establishing requirements
4. Determining solution cost
5. Managing projects
6. Testing solutions
7. Releasing to production

- a. Projects on budget
- b. Project effectiveness
- c. Adoption rate
- d. Projects on time
- e. Time to market

Purchasing & Acquisition
SP5

Mike Ricchio

1. Managing contracts
2. Managing purchase of goods and services
3. Managing inventory

- a. Contract costs
- b. Contract purchases
- c. Vendor payments
- d. Contract deliverables
- e. Timely procurement
- f. Goods and services
- g. Full inventory

Listening & Informing
SP6

David Brine

1. Managing DRS reputation/brand
2. Building relationships
3. Enabling feedback & identifying needs
4. Staying current on pension issues
5. Developing communication strategies
6. Creating informational content
7. Delivering information
8. Managing communication channels

- a. Online reach
- c. Content & materials review

Managing Risks
SP7

George Pickett

1. Identifying risk
2. Evaluating & assessing risk
3. Addressing & treating risk
4. Monitoring & reviewing risk & treatment plans
5. Adjusting as needed

- a. Risk management reviews
- b. Risk status
- e. On Time risk treatment plans
- g. Timely COOP update
- h. Efficient evacuations

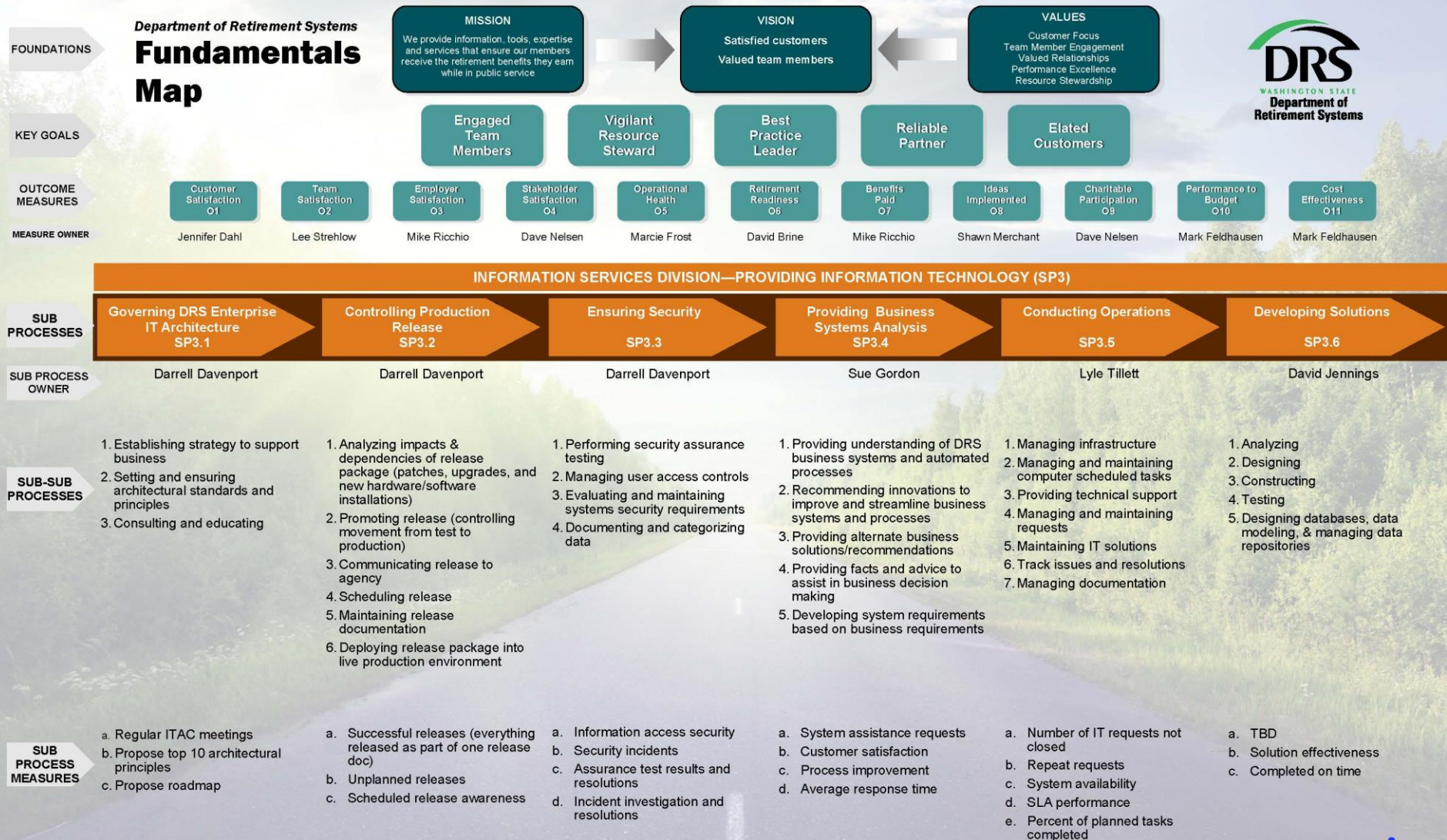
Supporting Community
SP8

Dave Nelsen

1. Creating community support teams
2. Evaluating & selecting charitable opportunities
3. Implementing charitable opportunities

- a. DRS events sponsored
- b. State CFD participation

INFORMATION SERVICES DIVISION



OUTCOME MEASURES

01-Customer Satisfaction

RESPECT	Valued Customer	87	96	94
	Carefully Guided	79	87	86
	Informed of Issues	77	88	83
RESPONSIVE	Quick Access	91	96	94
	Timely Response	82	91	92
	Informed Status	74	82	79
	Anticipate Needs	80	87	89
	Online Tools	81	86	85
RIGHT	Accurate Info	89	93	92
	Correct/Timely \$	90	95	97
		QTR3	QTR4	QTR5

- 275 interviews were conducted in the quarter

02-Team Satisfaction

Customer Focused	88	90	79	77
People & Team Focused	79	72	70	71
Supt & Engage Leadership	84	74	72	67
Open & Transp Communication	78	76	75	77
Learning & Growth	76	76	75	75
Accountability	79	79	73	71
Pursuit of Excellence	91	91	86	81
	QTR2	QTR3	QTR4	QTR5

- Each QTR is a roll-up of the most recent four quarters in order to obtain an appropriate sample size

Questions?